Vendor Survey Report

Prepared for Arkansas Department of Education

December 2017

ARKANSAS DEPARTMENT OF EDUCATION

HANOVER RESEARCH

www.hanoverresearch.com

EXECUTIVE SUMMARY AND KEY FINDINGS

Introduction

- This report presents the results of surveys administered by Hanover Research and the Arkansas Department of Education to assess the technology needs of teachers and school/district leaders across the state. Specifically, respondents were asked to:

  - Identify which Learning Management Systems (LMS) and Career Planning Tools (CPT) they (or their school/district) were currently using.
  - Provide information on cost and purchasing decisions of these systems.
  - Evaluate the importance of and satisfaction with those systems/products.
  - Identify additional systems/products they would like to have access to.

- The goals of this project were to identify technology products used by schools and districts across the state – particularly Learning Management Systems (LMS) and Career Planning Tools (CPT) – and assess the costs and perceptions of these investments, with the ultimate end of assisting the Department in developing statewide solutions to support the technology needs of educators.

Methodology Notes

Survey Development and Distribution

These surveys were developed collaboratively by Hanover Research and Arkansas Department of Education and distributed via list-serve by the Department. The survey was sent to all superintendents and principals in the state and to a random subset of teachers. The online survey was open across October 2017 and collected a total of 1,086 responses – 396 school and district leaders and 690 teachers. Approximately two-thirds of Arkansas school districts are represented in the leader survey, while the teacher survey includes responses from one-third of school districts.

Data Cleaning

Hanover took a number of steps in the data cleaning process to ensure the quality and accuracy of results. Data quality was checked for the leader and teacher surveys, including procedures for evaluating duplicate respondents, "speeders," and junk responses. No respondents from either survey were flagged as problematic, and therefore all complete and partial responses were included in the analyses. Please note that while some schools and districts were represented multiple times in the leadership survey, all estimates of extent of use were collapsed to the school- and district-level, such that a given school or district could mention a product only once. This was *not* done in the teacher survey, where all results reflect unweighted responses.

Open-Ended Responses

All open-ended responses were manually reviewed and cleaned. Because of the diverse range of responses given to many of the questions, it was difficult to generalize findings from open-ended responses with very low counts. Therefore, only the most widely applicable findings from the open-ended analysis were included in this report.

Methodology Notes

“Value” Estimates

At the request of Arkansas Department of Education, we compute a composite “value” variable to synthesize the results from two measures of a system’s value to the district. This “value” variable is taken at the system level and reflects an average of the percentage of respondents that considered each product “important”/”critically important” and the percentage of respondents that were “satisfied”/”very satisfied” with the same product. This was done for both leaders and teachers.

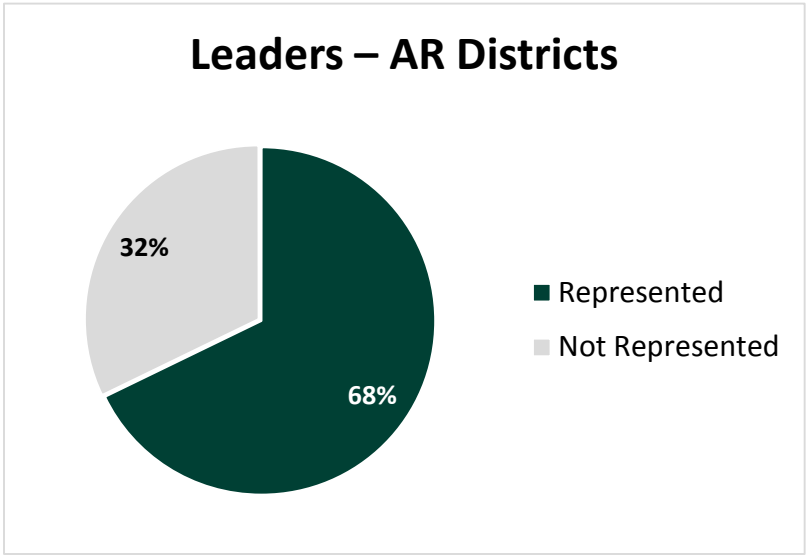
Cost Estimates

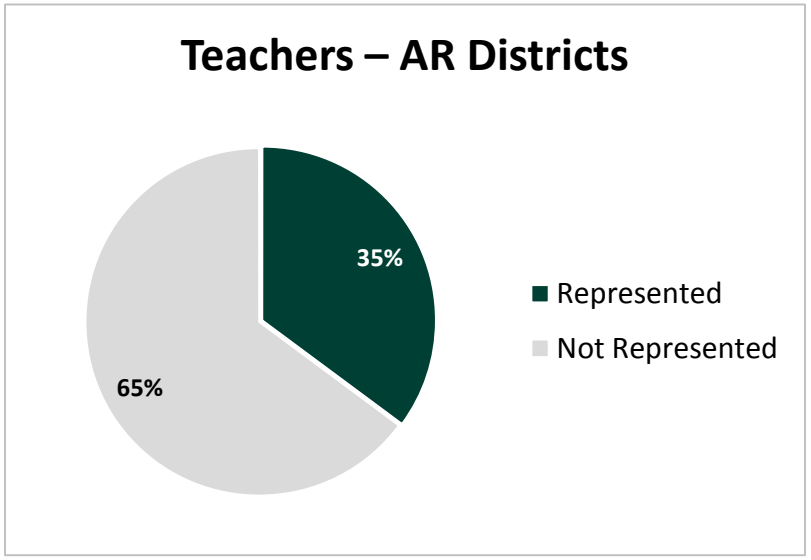
School and district leaders often did not provide comprehensive cost information for both Learning Management Systems (LMS) and Career Planning Tools (CPT), with the majority leaving these fields blank or otherwise providing estimates that had extreme price differences and clear outliers. As such, we do not make statewide cost estimates based on these data.

Overall Sample Summary

- A total of 1,086 respondents completed the two surveys (396 leaders and 690 teachers).
- A wide range of Arkansas school districts were represented in the leaders' survey. The sample of 690 teachers included respondents from over one-third of districts in the state.

% of Arkansas School Districts Represented in Surveys

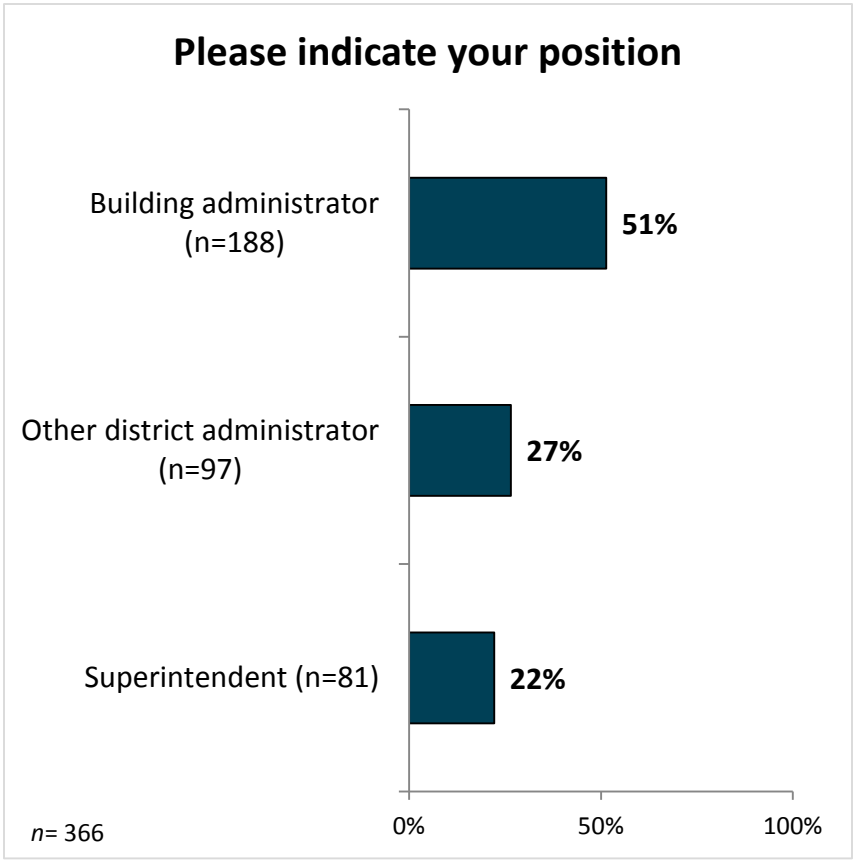


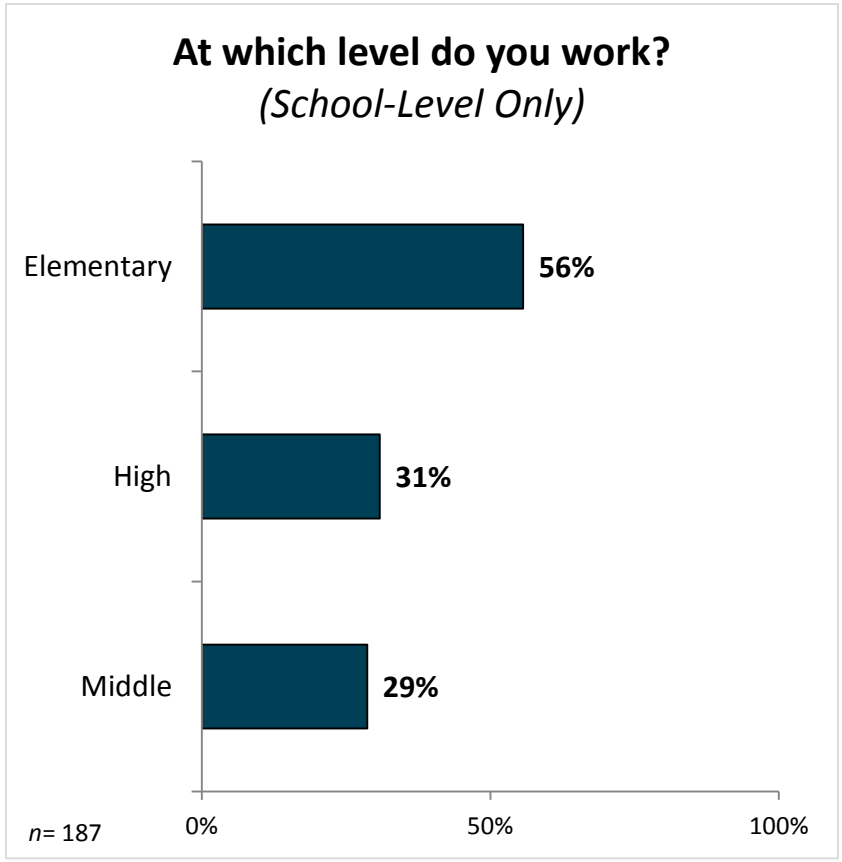


Note: Values represent the percentage of the 261 total Arkansas school districts.

Sample Summary – Leaders Survey

- The majority of leaders are building administrators (51%) at elementary schools (56%).





Sample Summary – Leaders Survey

- When evaluating the use of LMS and CPT products, Hanover filtered the survey data to evaluate two measures:

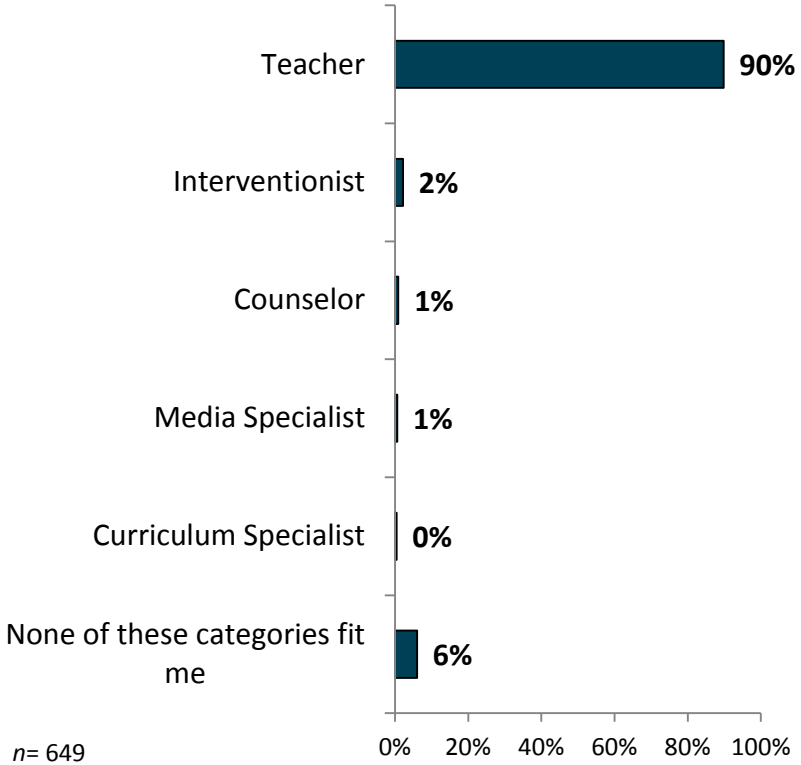
  - **“District Use of Products”**: This group of respondents consisted of only those that indicated they worked at the district-level (i.e., they were superintendents or “other district administrators”). All duplicate responses were collapsed into one response per district represented. For example, if two respondents came from the same district and Respondent A indicated their district used “Google Classroom,” “Edmentum,” and “Learning.com,” and Respondent B indicated they used “Google Classroom” and “Plato,” then that district would be represented by one response that included Google Classroom, Edmentum, Learning.com, and Plato. **There were 108 unique districts represented in the survey.**

  - **“School Use of Products”:** This group consisted of only those that indicated they worked at the school-level (i.e., building administrators). The same process was followed as above except using individual schools. **There were 164 unique schools represented in the survey.**

Sample Summary – Teacher Survey

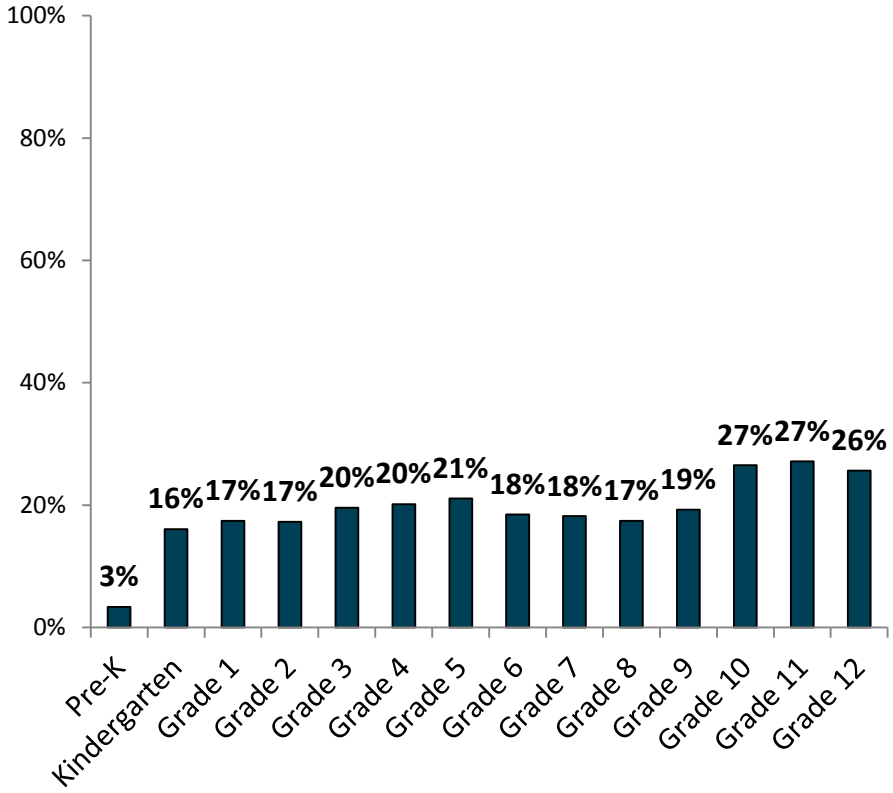
- Nearly all respondents are teachers (90%). The largest percentage of respondents teach Grade 10 (27%), Grade 11 (27%), and Grade 12 (26%).

Please indicate your position



n= 649

What grade levels do you serve?



Key Findings

- **Google Classroom is by far the most commonly used product by leaders and teachers.** Seventy-eight percent of leaders report that their school/district uses the program, while 68 percent of teachers do. This exceeds the next most commonly used products (Istation; 21%, Blackboard; 20%, and Apex; 19%). Google Classroom is largely free.

- **Among career planning tools, ASVAB is the most widely used product, noted by (57%) of district leaders.** About a quarter of middle and high schools report using it, though teacher use and awareness is low. Fewer districts (38%) report using Kuder, another career planning tool.

- **MobyMax is the most commonly used "other" product.** Both leaders and teachers wrote-in that MobyMax was also used by their school/district. MobyMax is a personalized learning product that aims to find missing skills and identify learning gaps.

- **More than any other additional program, school and district leaders indicate interest in Renaissance Learning products.** MobyMax was also desired by both leadership and teachers alike, while interest in Renaissance was primarily at the leadership level.

Key Findings

- **Leaders tend to be more satisfied with products than teachers, though satisfaction is generally high.** More than two-thirds of leaders report being "satisfied" or "very satisfied" with 12 of the 16 listed products. Teachers report high satisfaction with 5 of 12 products, however only two products have the support of less than half of the teachers, Classworks (41%) and Edmodo (35%).

- **Leaders consider most products to be highly important, while teachers express doubt about the importance of some products.** More than two-thirds of leaders consider 15 of 16 listed products to be "important" or "critically important" for school/district operations. Teachers are more likely to rate many of the products used as only of "minor importance." Amongst teachers, Google Classroom is by far the most widely-used and valued product.

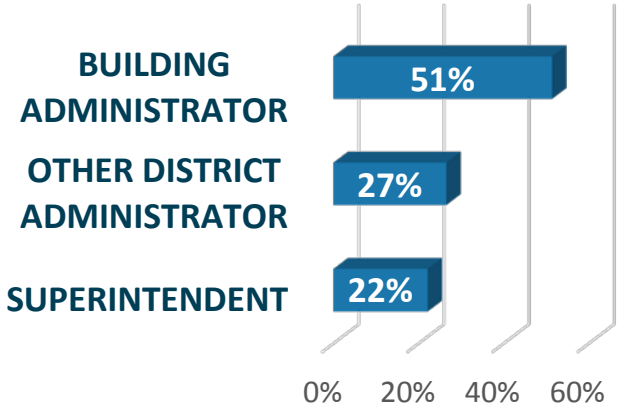
- **Leaders and teachers identify several additional products that they think would help increase efficiency and student performance.** In open-ended responses, leaders were most likely to cite Renaissance Learning (39%) and MobyMax (19%). Teachers identified MobyMax (15%) and Spelling City (10%).

- **Costs and purchasing decisions are relatively split between districts and schools.** Among products used by schools/districts, leaders report that it is a relatively even split between which level makes the purchasing decisions and incurs the cost. However, for the most commonly used product (Google Classroom), nearly all leaders (90%) report that the procurement decision lies with the district.

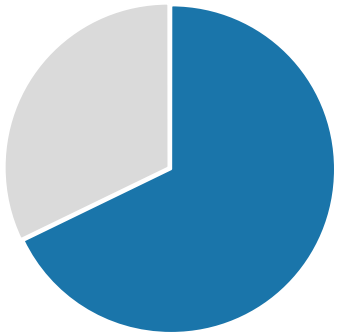
2017 VENDOR SURVEY [SCHOOL/DISTRICT LEADERS]

ARKANSAS DEPARTMENT OF EDUCATION

[*n*= 396 Leaders]



68% of Districts Represented



Top Career Planning Products Used

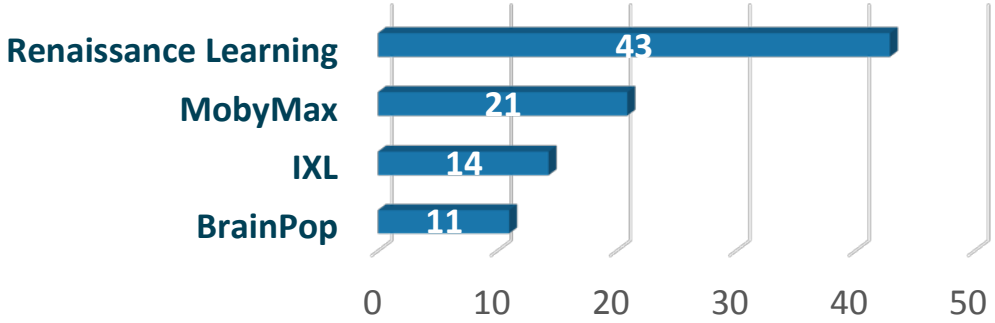
ASVAB
- 57% of Districts
- 82% Value Score

Kuder
- 38% of Districts
- 80% Value Score

Top LMS Products Used

Google Classroom	• 84% of Districts • 71% of Schools • 92% Value Score
Istation	• 27% of Districts • 15% of Schools • 89% Value Score
Blackboard	• 29% of Districts • 18% of Schools • 80% Value Score

Top Additional Products Requested



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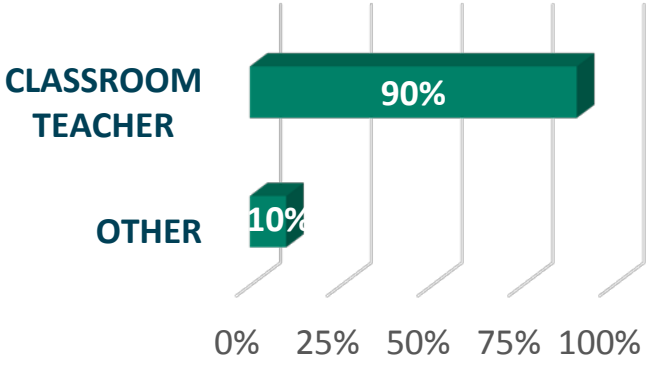
2017 VENDOR SURVEY [TEACHERS]

ARKANSAS DEPARTMENT OF EDUCATION

[*n*= 690 Teachers]



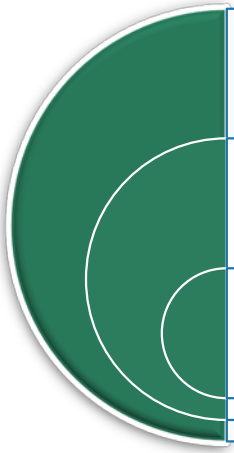
35% of Districts Represented

Top Career Planning Products Used

Kuder — 12% of 6-12 Teachers

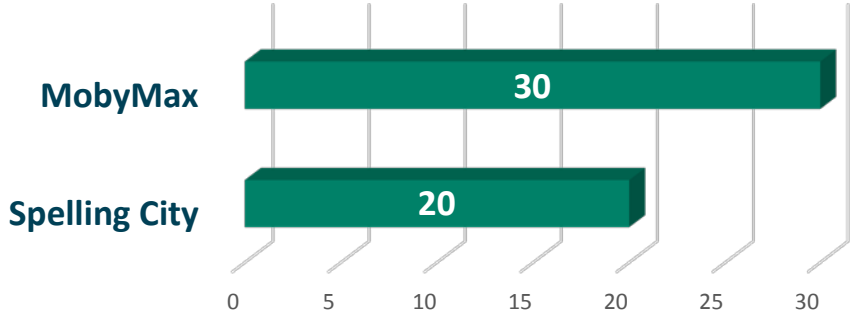
Naviance — 6% of 6-12 Teachers

Top LMS Products Used



Google Classroom	• 68% of Teachers • 88% Value Score
Moodle	• 11% of Teachers • 65% Value Score
McGraw-Hill Connect	• 11% of Teachers • 68% Value Score

Top Additional Products Requested



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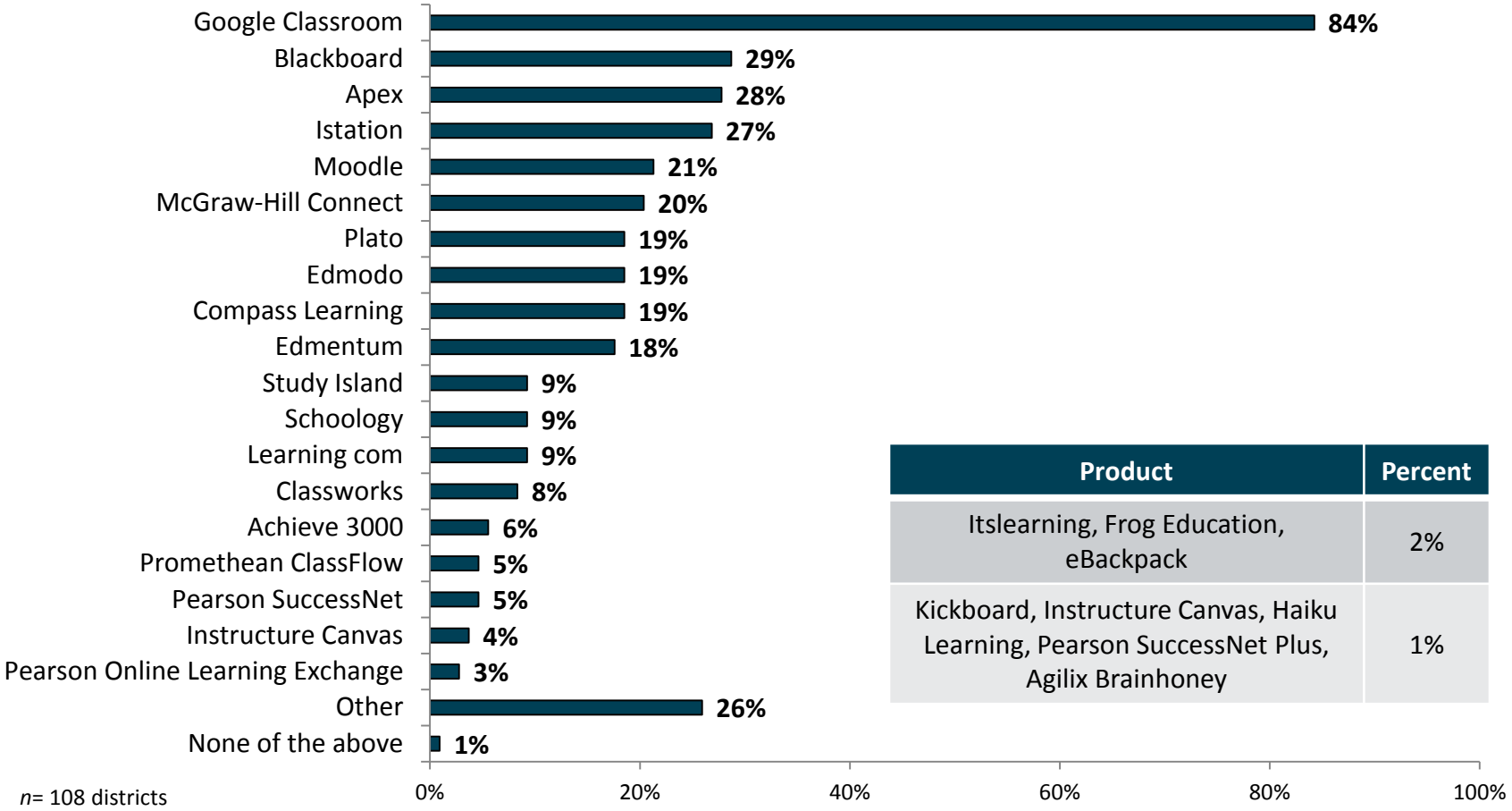
LEARNING MANAGEMENT SYSTEMS

Percentage of Districts Using LMS Products

- District leaders report that Google Classroom is being used by a large majority of districts (84%), far more than other LMS products.

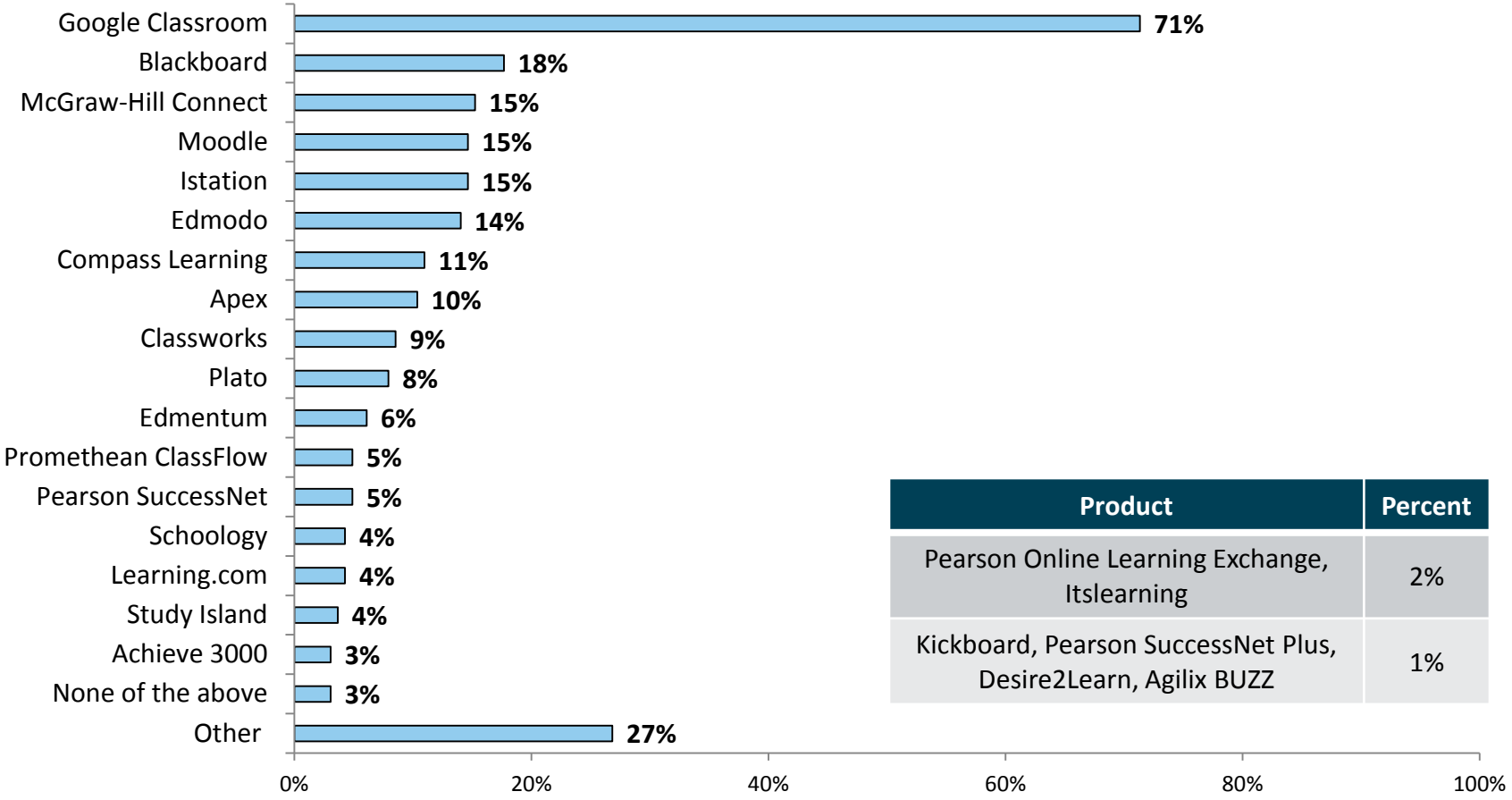


Product	Percent
Itslearning, Frog Education, eBackpack	2%
Kickboard, Instructure Canvas, Haiku Learning, Pearson SuccessNet Plus, Agilix Brainhoney	1%

n= 108 districts

Percentage of Schools Using LMS Products

- School leaders report that Google Classroom is the top-used product (71%).

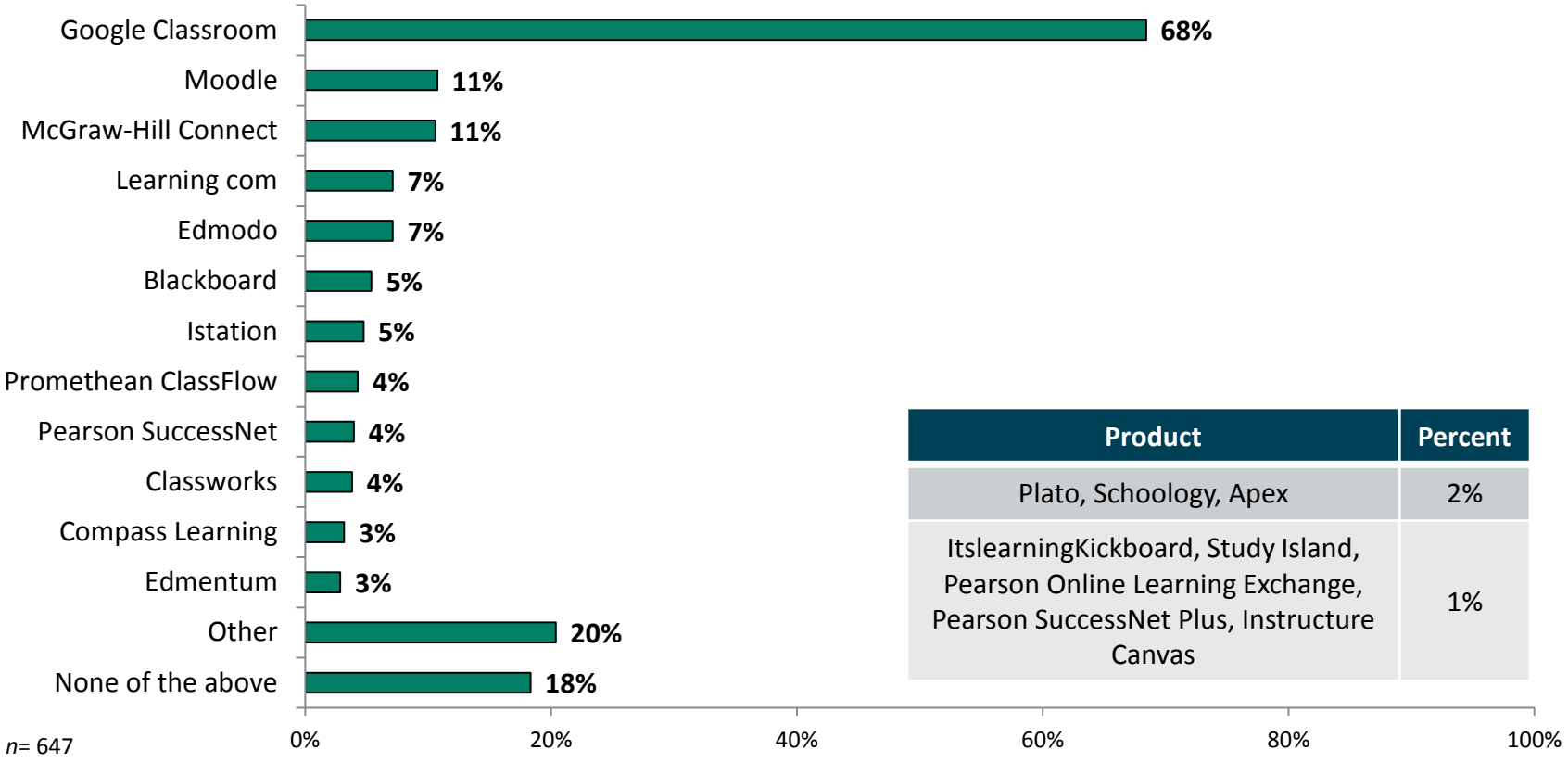


Product	Percent
Pearson Online Learning Exchange, Itslearning	2%
Kickboard, Pearson SuccessNet Plus, Desire2Learn, Agilix BUZZ	1%

n= 164 schools

Percentage of Teachers Using LMS Products

- Two-thirds of teachers report using Google Classroom (68%), while 11 percent use Moodle and McGraw-Hill Connect.



n= 647

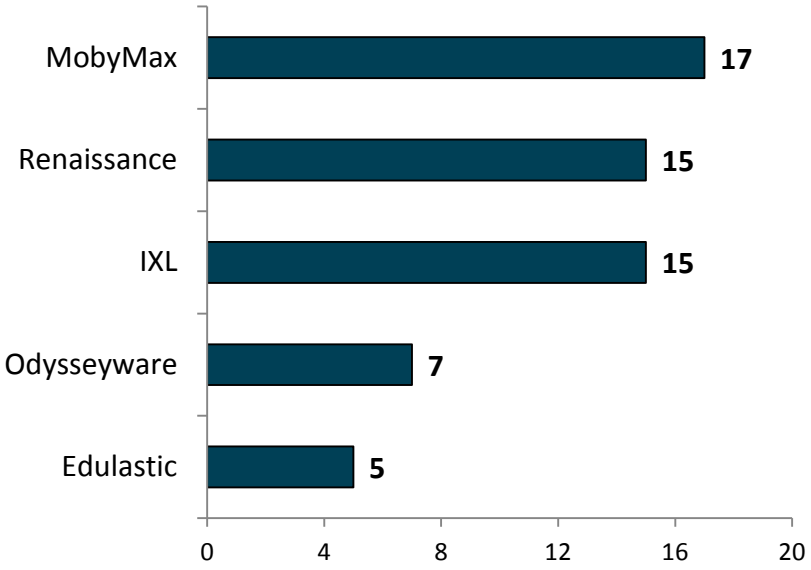
Product	Percent
Plato, Schoology, Apex	2%
ItslearningKickboard, Study Island, Pearson Online Learning Exchange, Pearson SuccessNet Plus, Instructure Canvas	1%

Additional LMS Products Used

- The top-listed "other" products used by schools/districts are MobyMax (17 out of 86) and Renaissance and IXL (15 out of 86).
- The top-listed "other" products used by teachers are MobyMax (12 out of 125) and IXL (9 out of 125). However, a wide distribution of "other" products are used by teachers.

Top "Other" Products Used

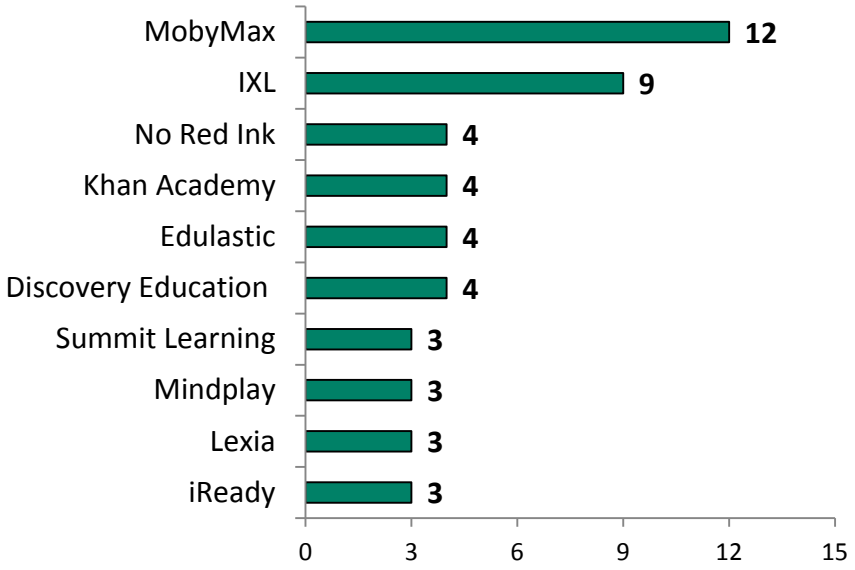
School/District Leaders



n= 86. Note: Because of the low *n*, values are displayed as counts. These generally range from 1% to 4% of the total sample .

Top "Other" Products Used

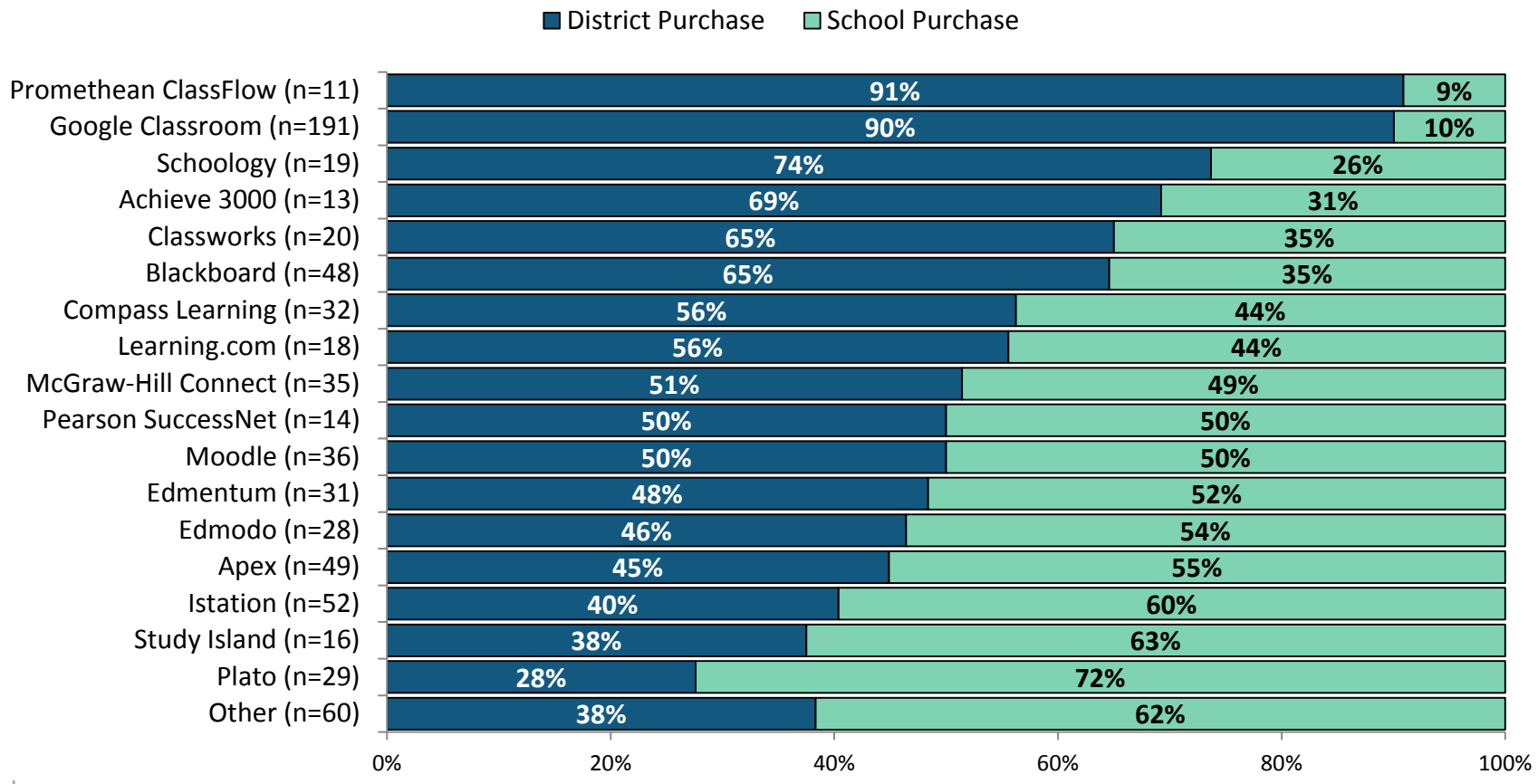
Teachers



n= 125. Note: Because of the low *n*, values are displayed as counts. These generally range from <1% to 2% of the total sample .

Purchasing Decisions at the District- or School-Level

- Respondents were asked to note whether purchasing decisions for LMS products were made at the school- or district-level. This split is relatively even across systems. Of the four most-commonly used systems, Google Classroom and Blackboard are primarily procured at the district level (90 percent and 65 percent respectively), while Istation and Apex are more often procured as a result of school purchasing decisions.



Cost of Top LMS Products

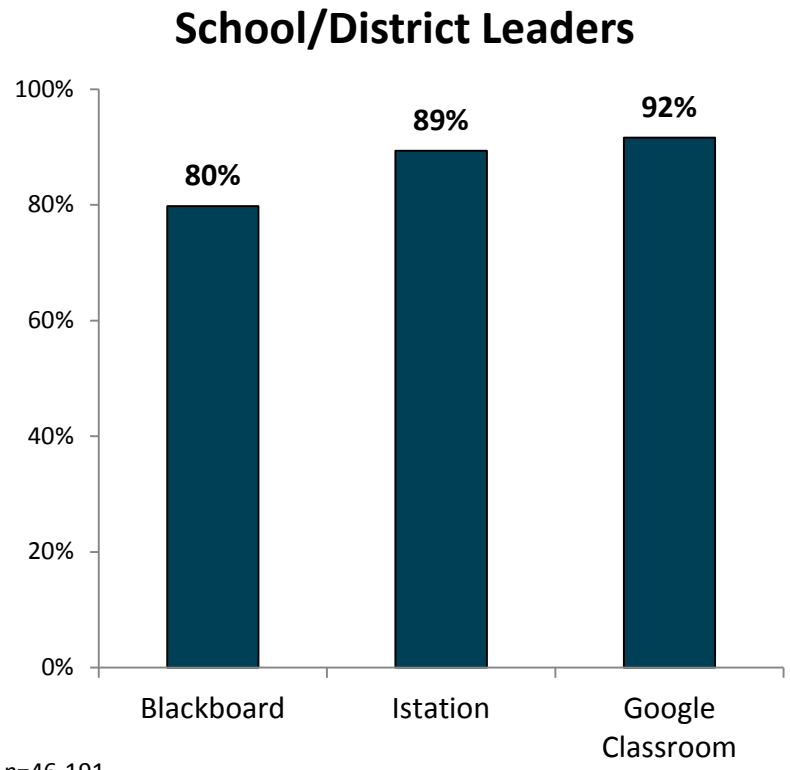
- The reported costs of the different LMS products are listed below.

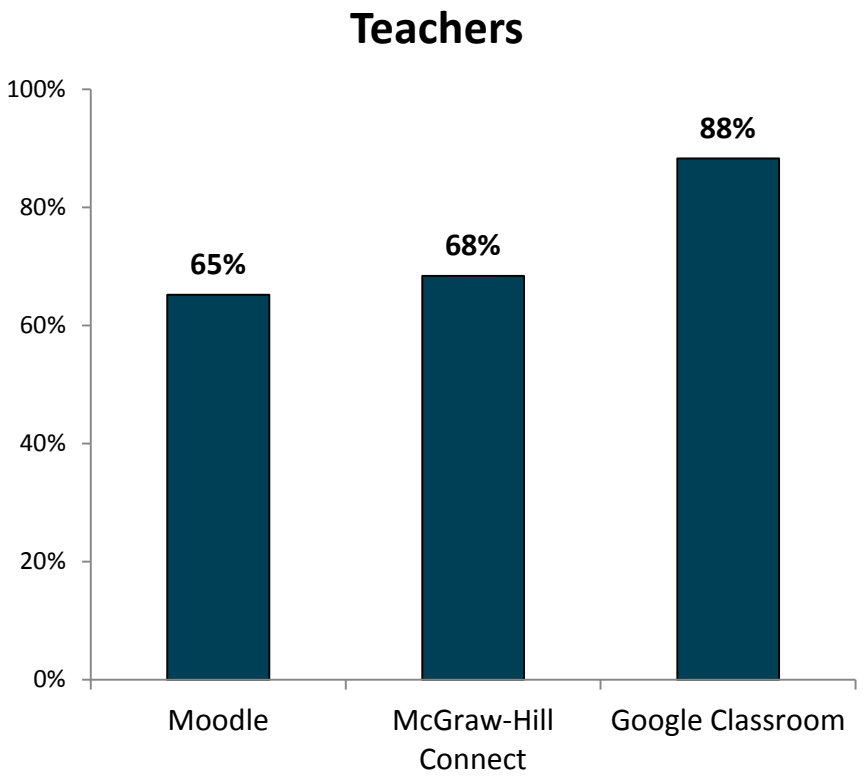
Learning Management System	Cost
Google Classroom (*n*=150)	• Average: $1,020 • Highest: $60,000 (*n*=1) • Lowest: $0 (*n* =136) • Unknown to respondent (*n*=15)
Istation (*n*=37)	• Average: $6,582.73 • Highest: $35,074.50 (*n*=1) • Lowest: $0 (*n*=9)
Blackboard (*n*=29)	• Average: $2,604.29 • Highest: $20,000 • Lowest: $0 (*n*=10) • Unknown to respondent (*n*=4)
Apex (*n*=42)	• Average: $10,453.97 • Highest: $54,000 • Lowest: $0 (*n*=1) • Unknown to respondent (*n*=4)

Note: Cost information is only the top products used. For a full list of the products used by districts/schools and their costs, see the data supplement.

“Value” of Top-Three LMS Products

The large majority of respondents consider the top three products to be highly valuable. Google Classroom particularly stands out for teachers.

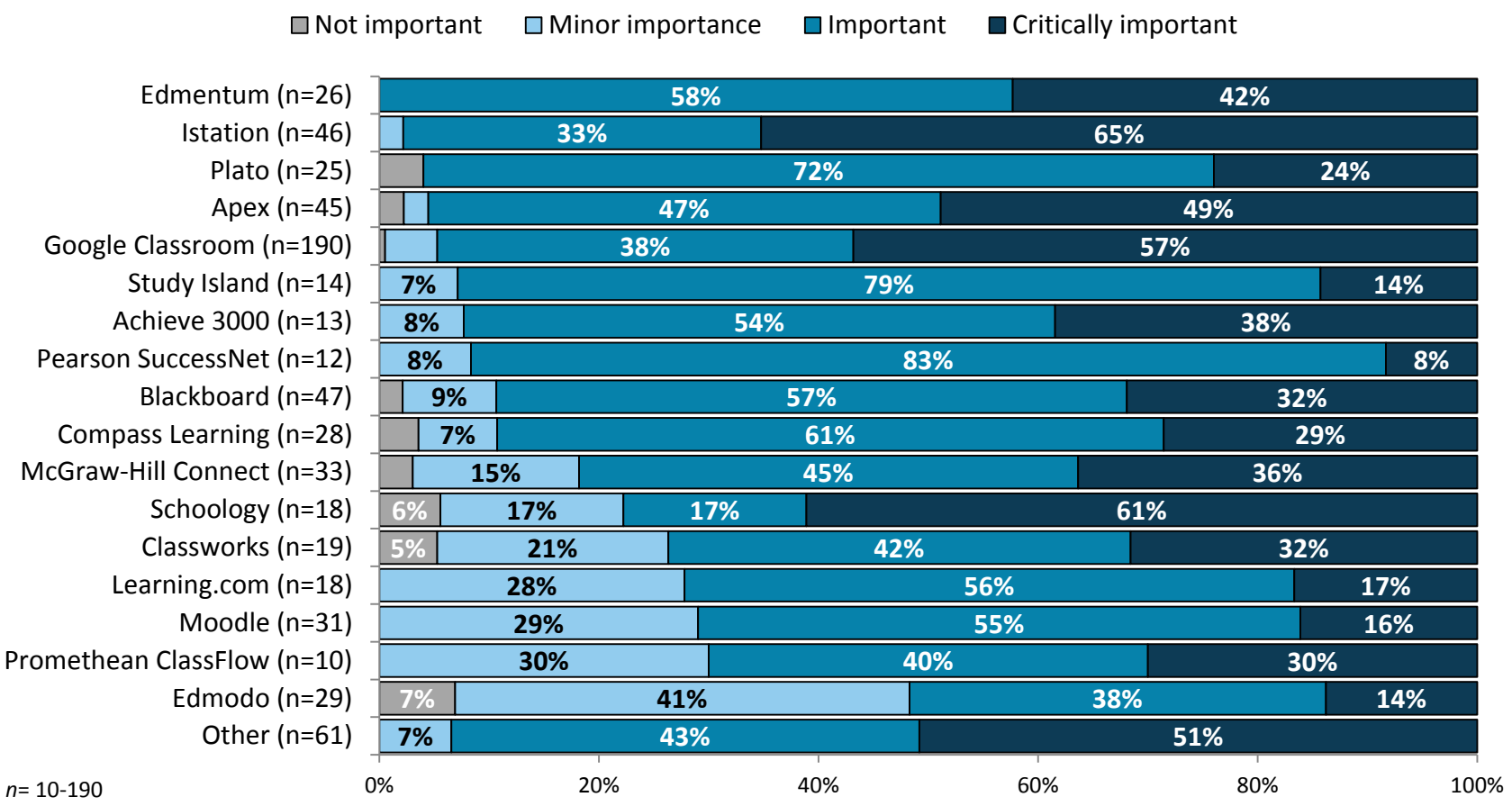




n=46-191

Importance of Programs for School/District Operations

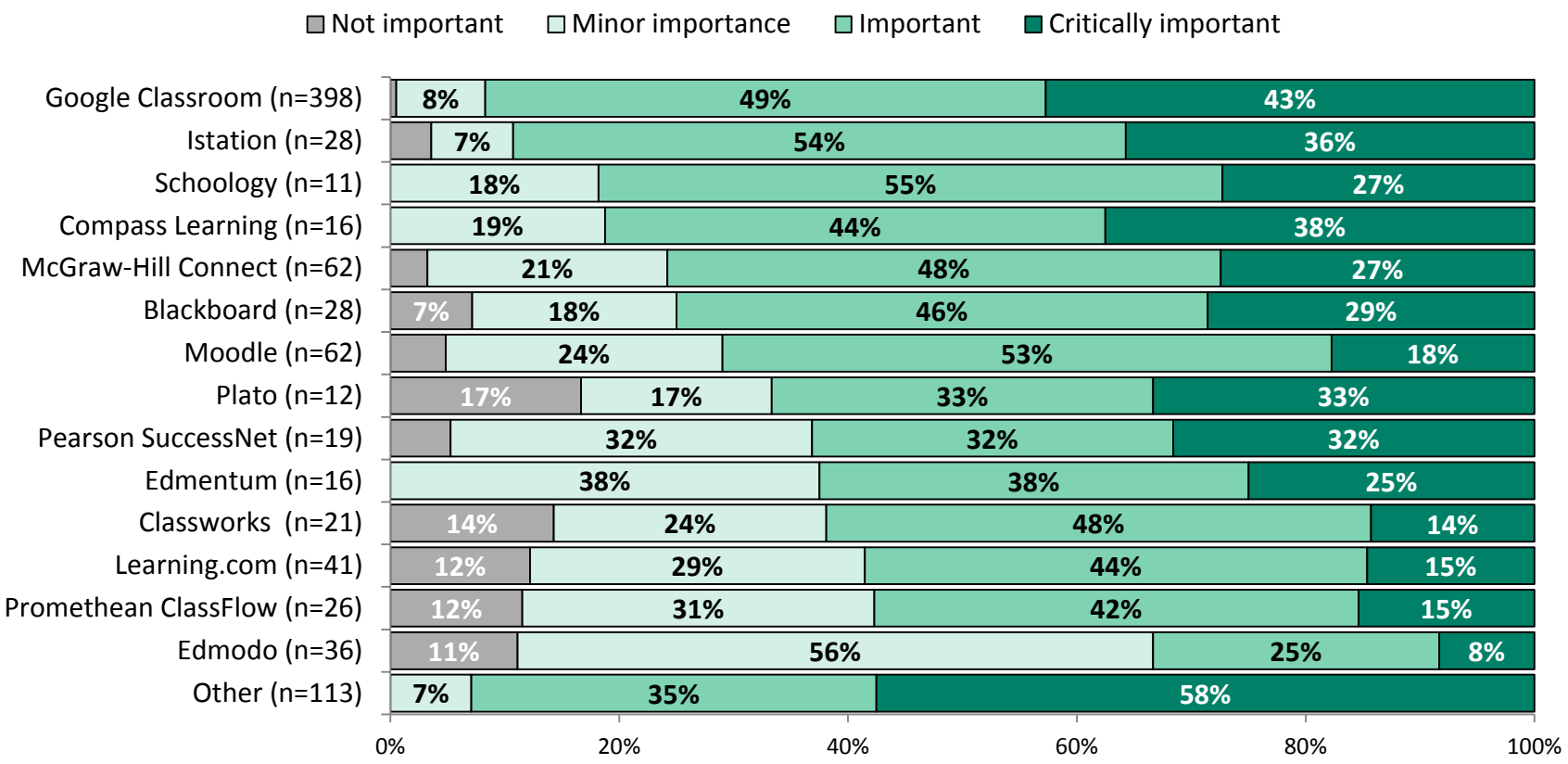
- Leaders report that most programs are highly important to school/district operations, especially Edmentum (100%), Istation (98%), and Plato (96%).



n= 10-190

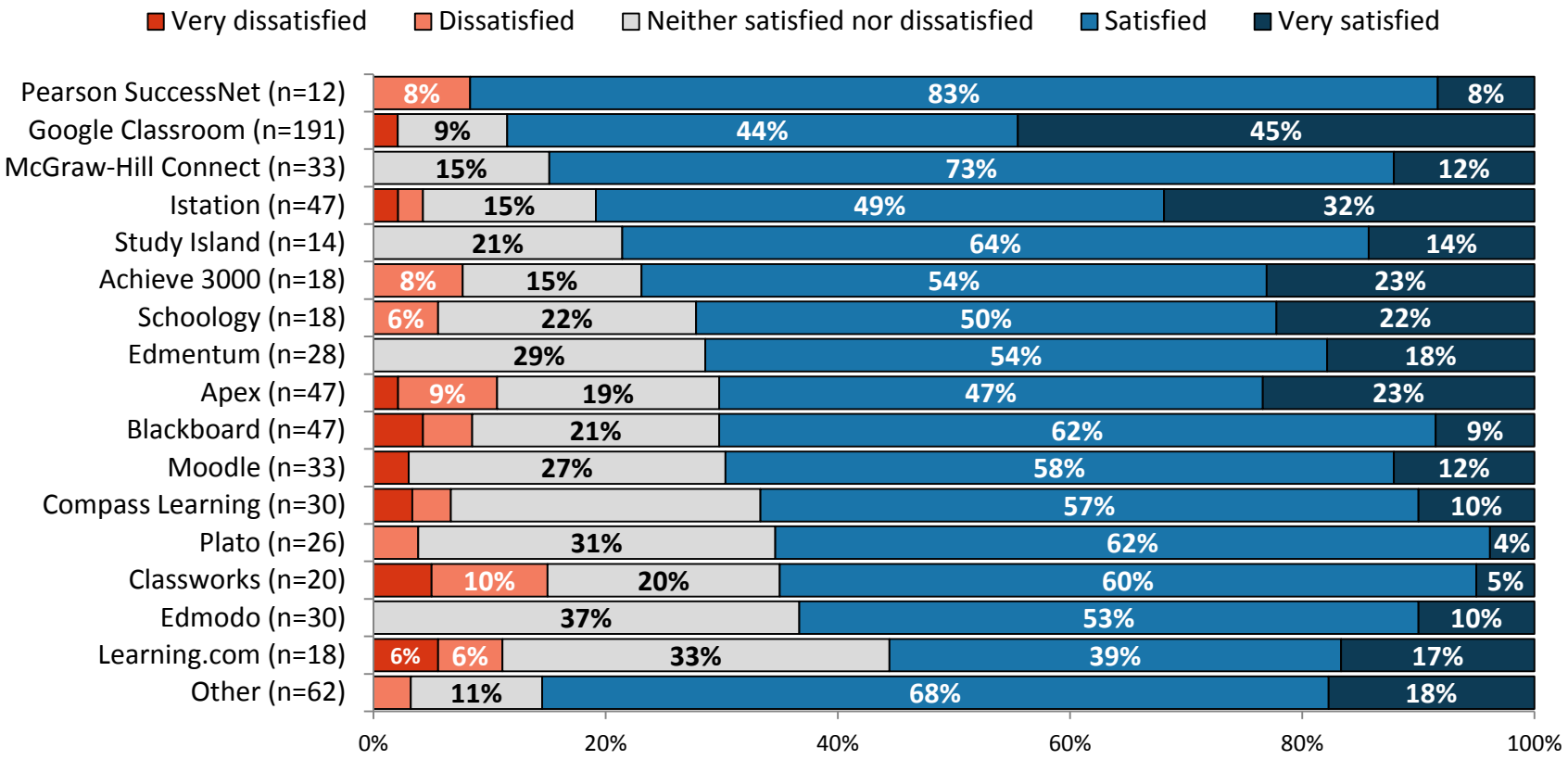
Importance of Programs for Teachers

- More than three-quarters of respondents rate Google Classroom (92%), Istation (90%), Schoology (82%) and Compass Learning (82%) as important/critically important. Few consider Edmodo important (33%).



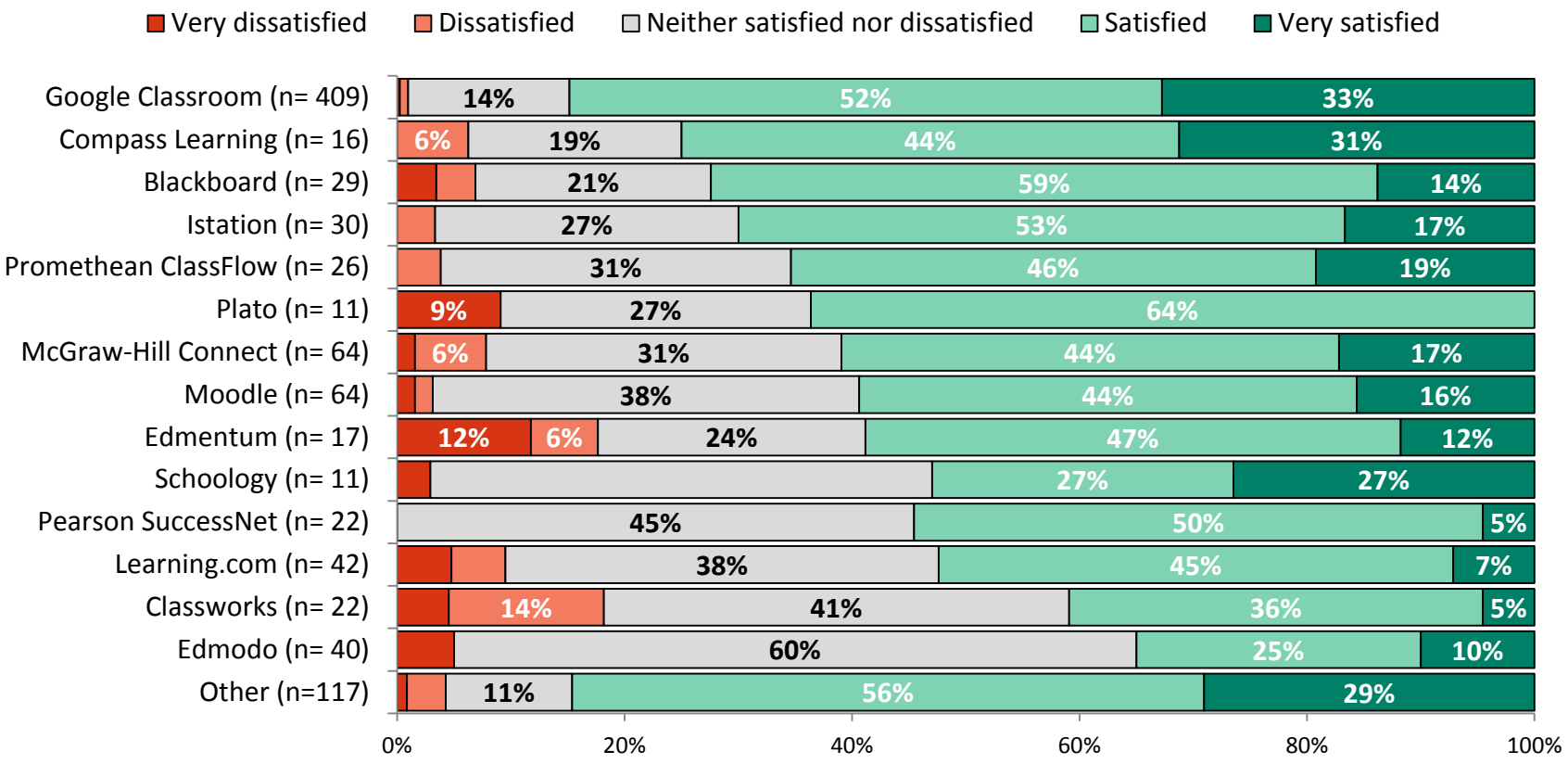
Satisfaction of School/District with Services, Delivery, and Costs of Programs – School and District Leaders

- Leaders are most satisfied with Pearson SuccessNet (91% satisfied/very satisfied), Google Classroom (89%), and McGraw-Hill Connect (85%).



Satisfaction with Services, Delivery, and Costs of Programs – Teachers

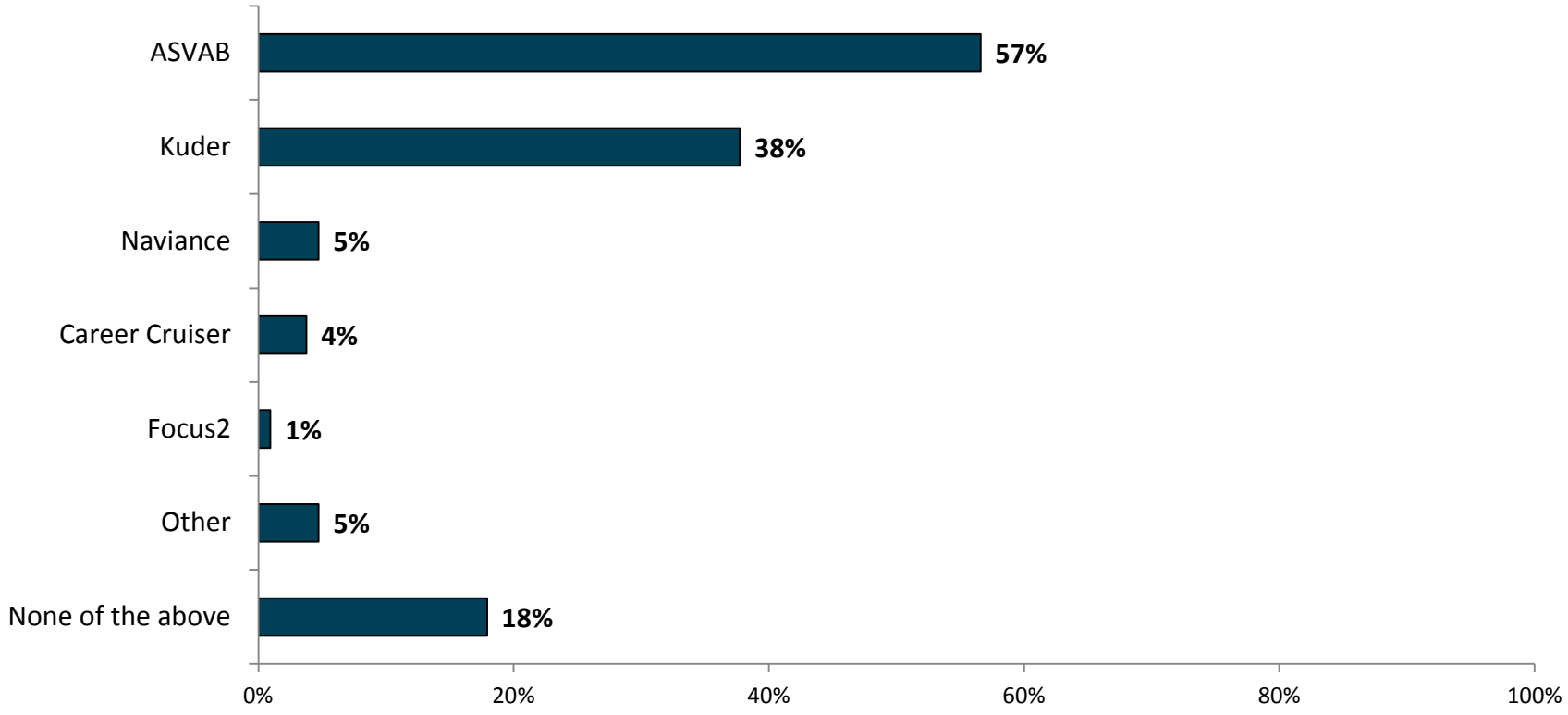
- Respondents are highly satisfied with Google Classroom (85%) and Compass Learning (75%). Few respondents are satisfied with Edmodo (35%) and Classworks (41%).



CAREER PLANNING TOOLS

Percentage of Districts Using CPT Products

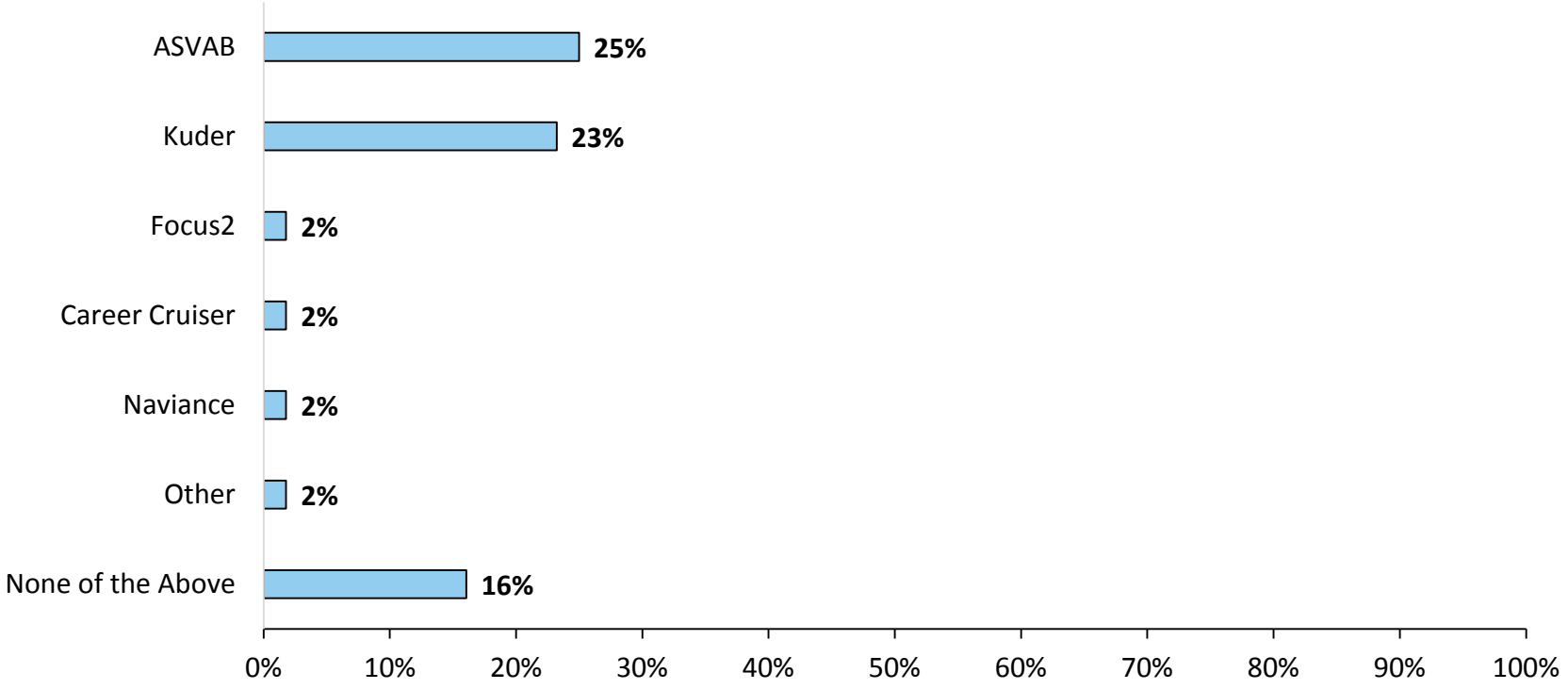
- More than half of district leaders report using ASVAB (57%).



n= 106 districts

Percentage of Schools Using CPT Products

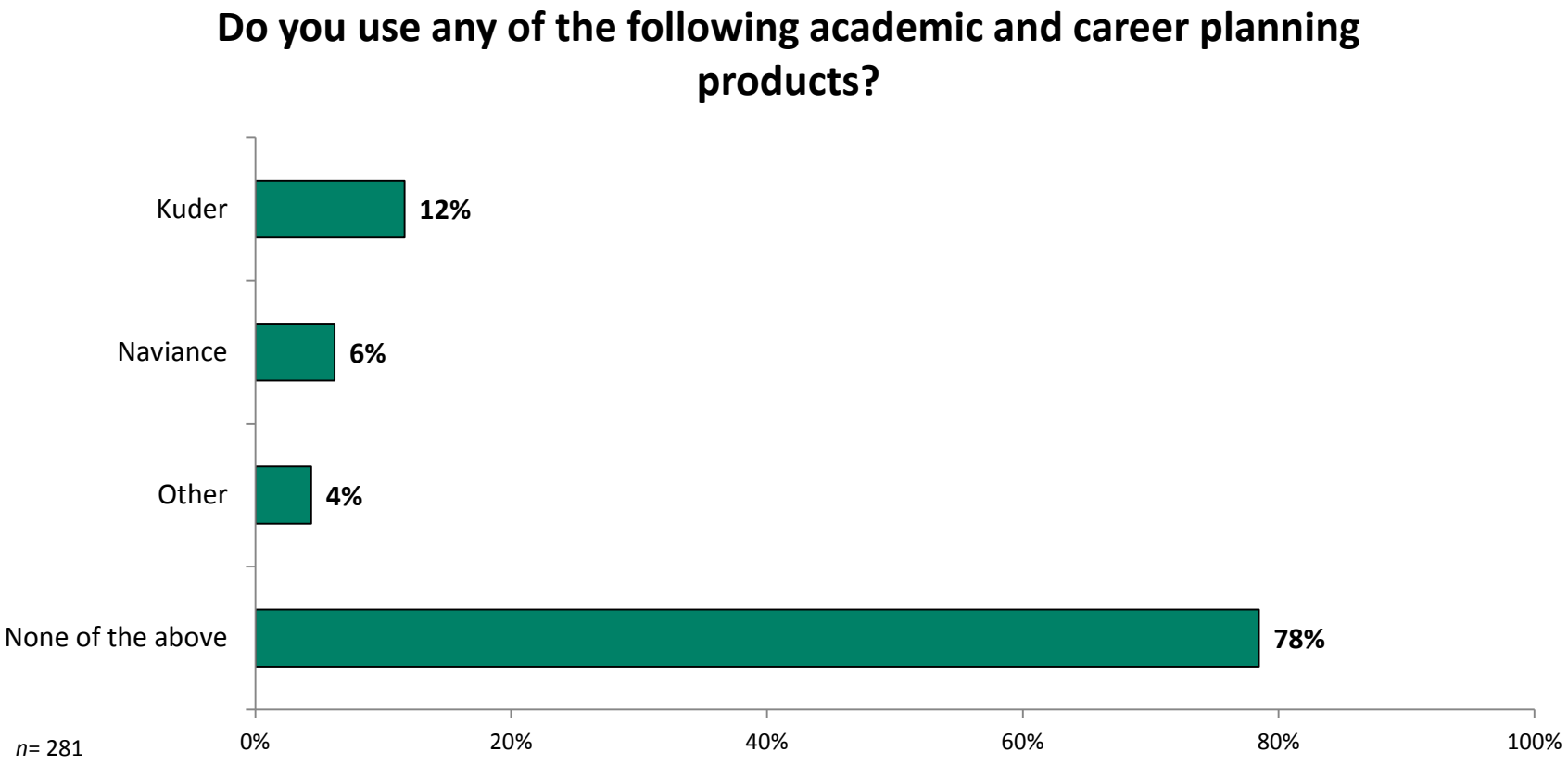
- Amongst middle and high schools, the percentage of schools using ASVAB and Kuder are 25 percent and 23 percent respectively. Twelve percent of 6-12 teachers report using Kuder, and 6 percent report using Naviance.



n= 112 middle and high schools

Percentage of 6-12 Teachers Using CPT Products

- Few teachers report using the listed academic and career planning products.



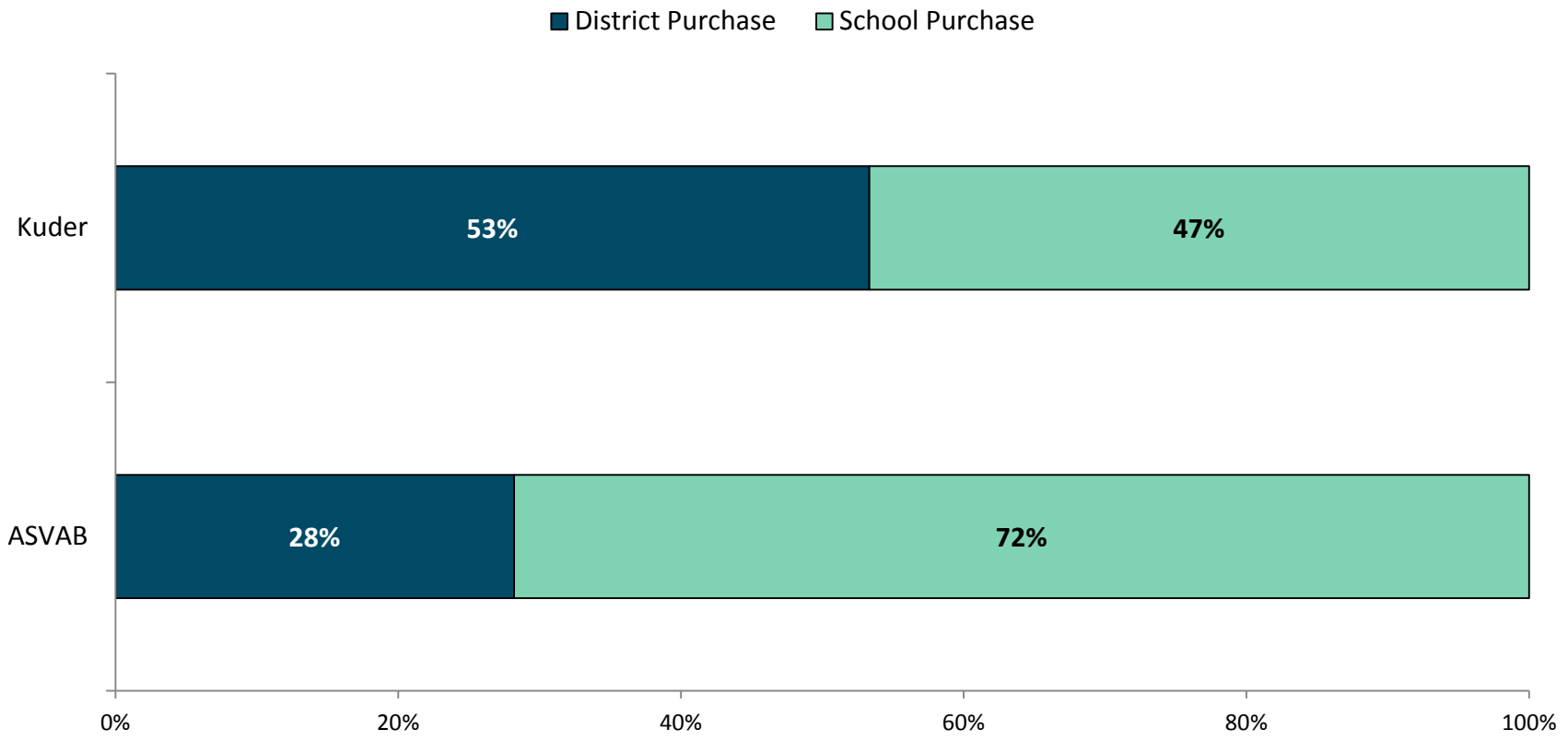
Cost of Top CPT Products

Learning Management System	Cost
ASVAB (*n*=64)	• Average: $117.65 • Highest: $3,000 (*n*= 1) • Lowest: $0 (*n*= 52) • Unknown to respondent (*n*=2) • Other explanation (*n*= 1)
Kuder (*n*=50)	• Average: $968.94 • Highest: $12,000 (*n*=1) • Lowest: $0 (*n*=23) • Unknown to respondent (*n*=4) • Unknown to respondents (*n*= 5)

Note: Cost information is only the top products used. For a full list of the products used by districts/schools. For the full verbatim cost responses, see the Data Supplement.

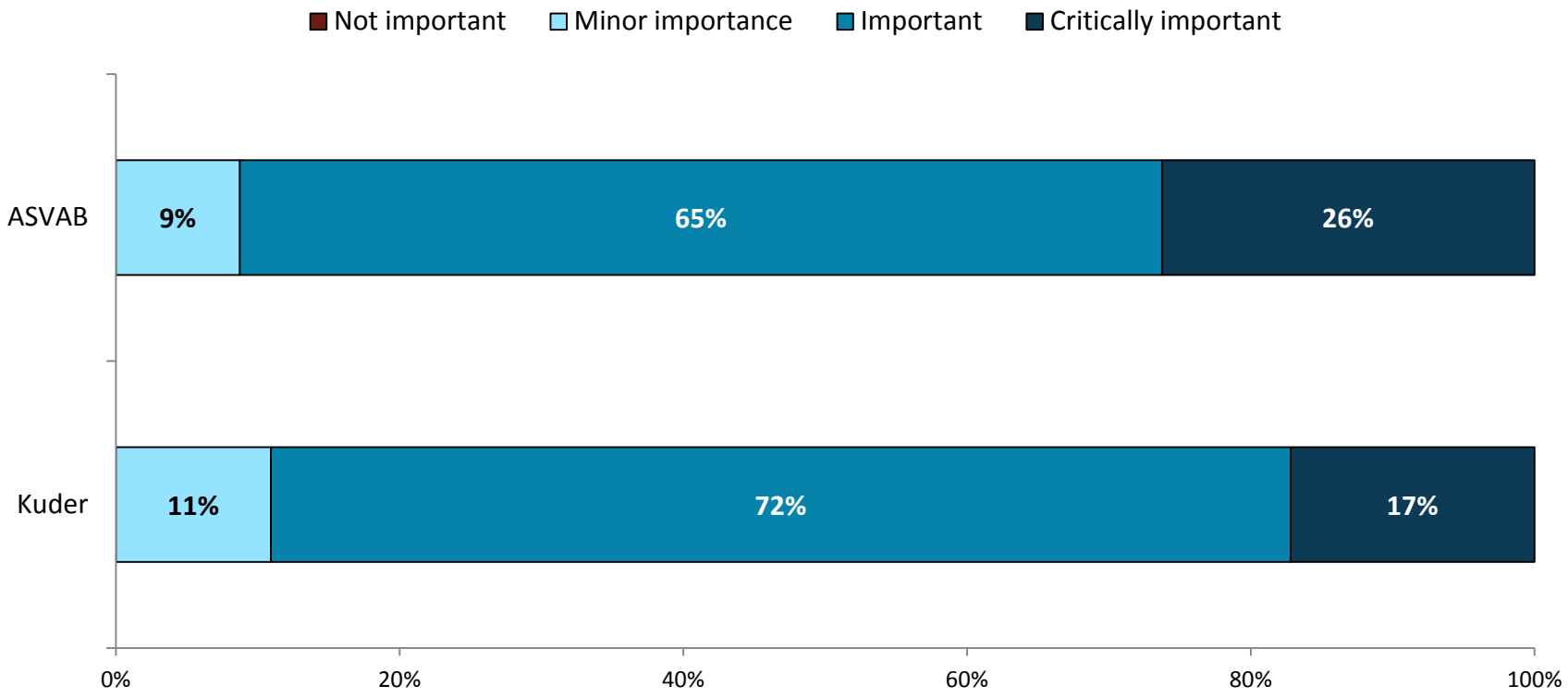
District or School-Level Purchasing Decisions

- Of the most commonly used academic/career planning products, 53 percent of respondents indicate that Kuder is a district-level purchasing decision, while 72 percent indicate that ASVAB is a decision made at the school-level.



Importance for School and District Operations – Leaders

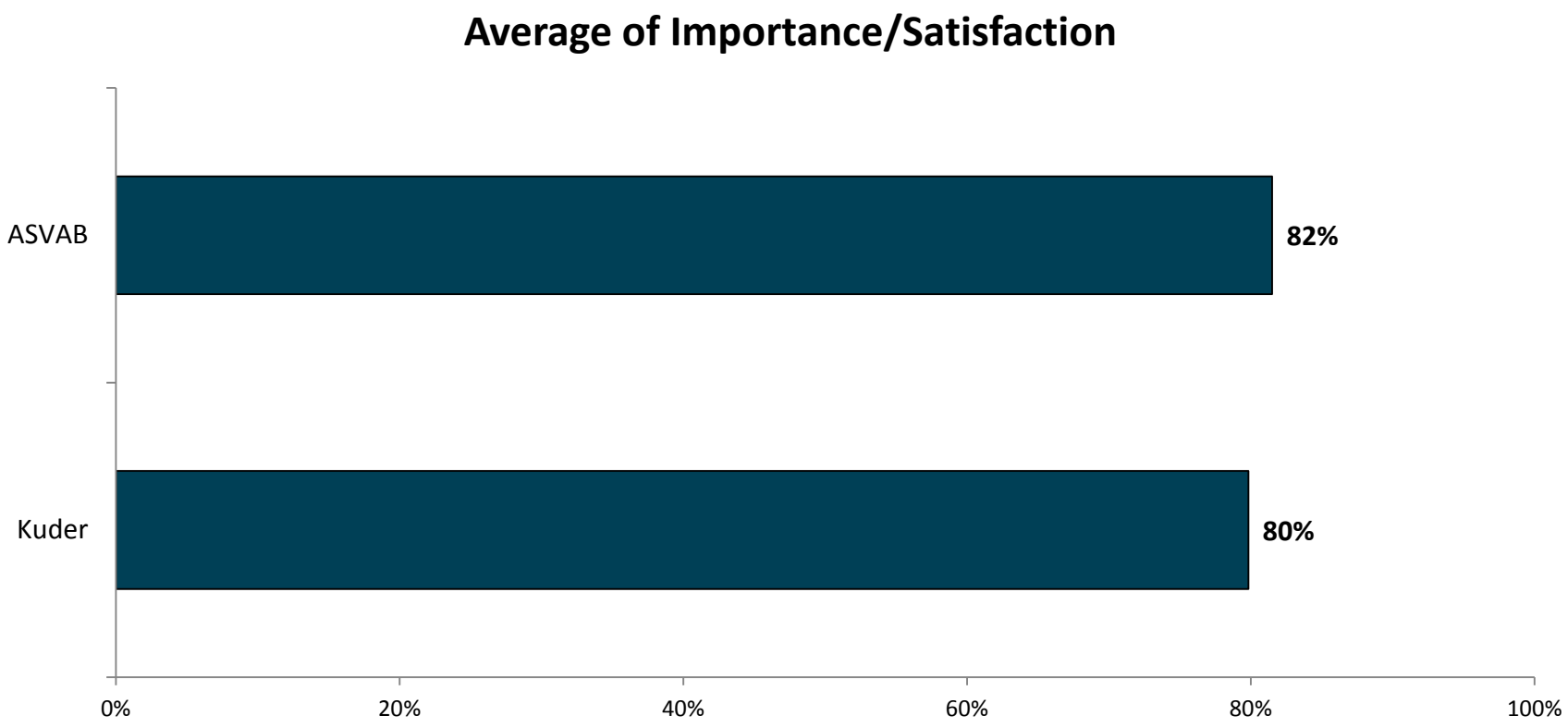
- Both academic/career planning products are rated as highly important to school and district operations.



n= 64-80

“Value” of Top CPT Products

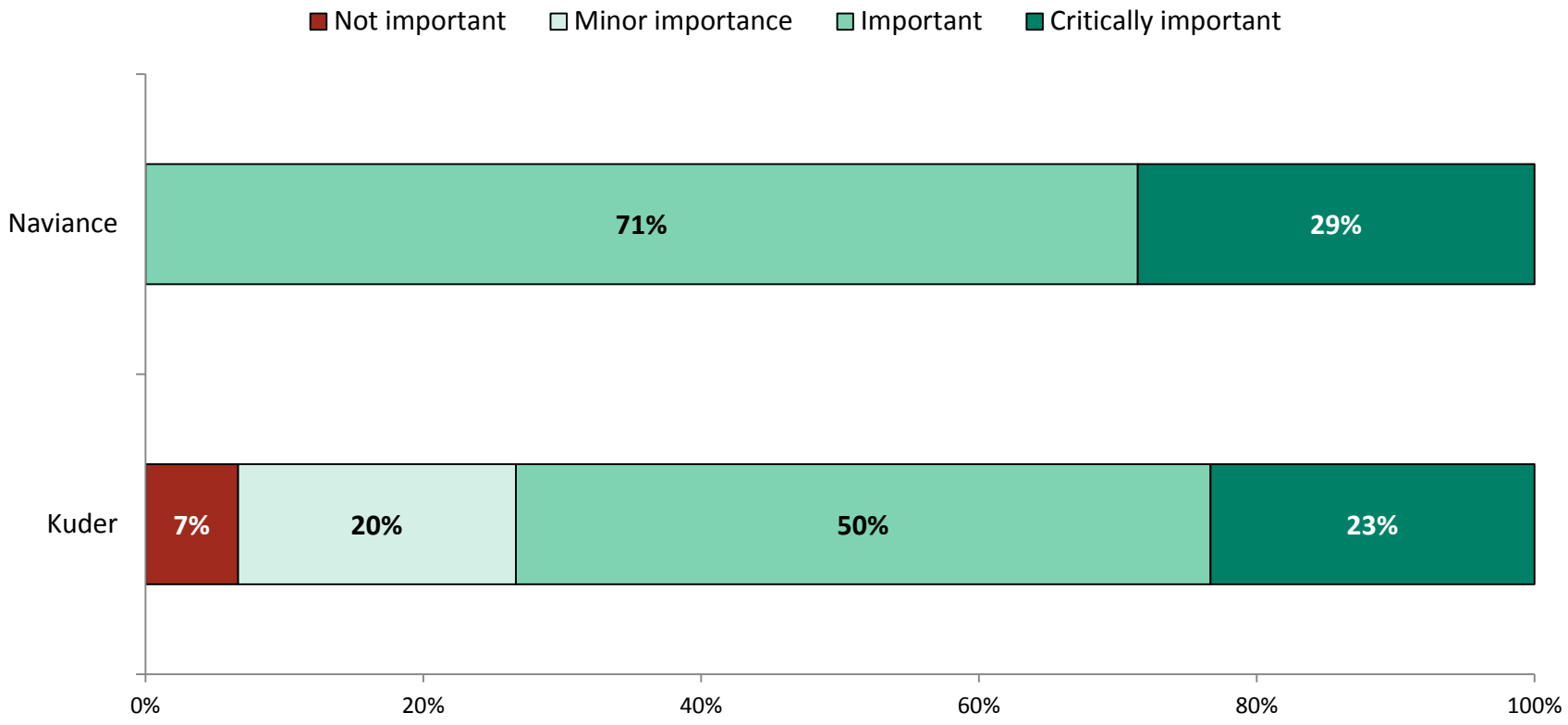
The majority of respondents (80% or more) consider the top CPT products to be valuable.



n=64-85

Importance for School and District Operations – Teachers

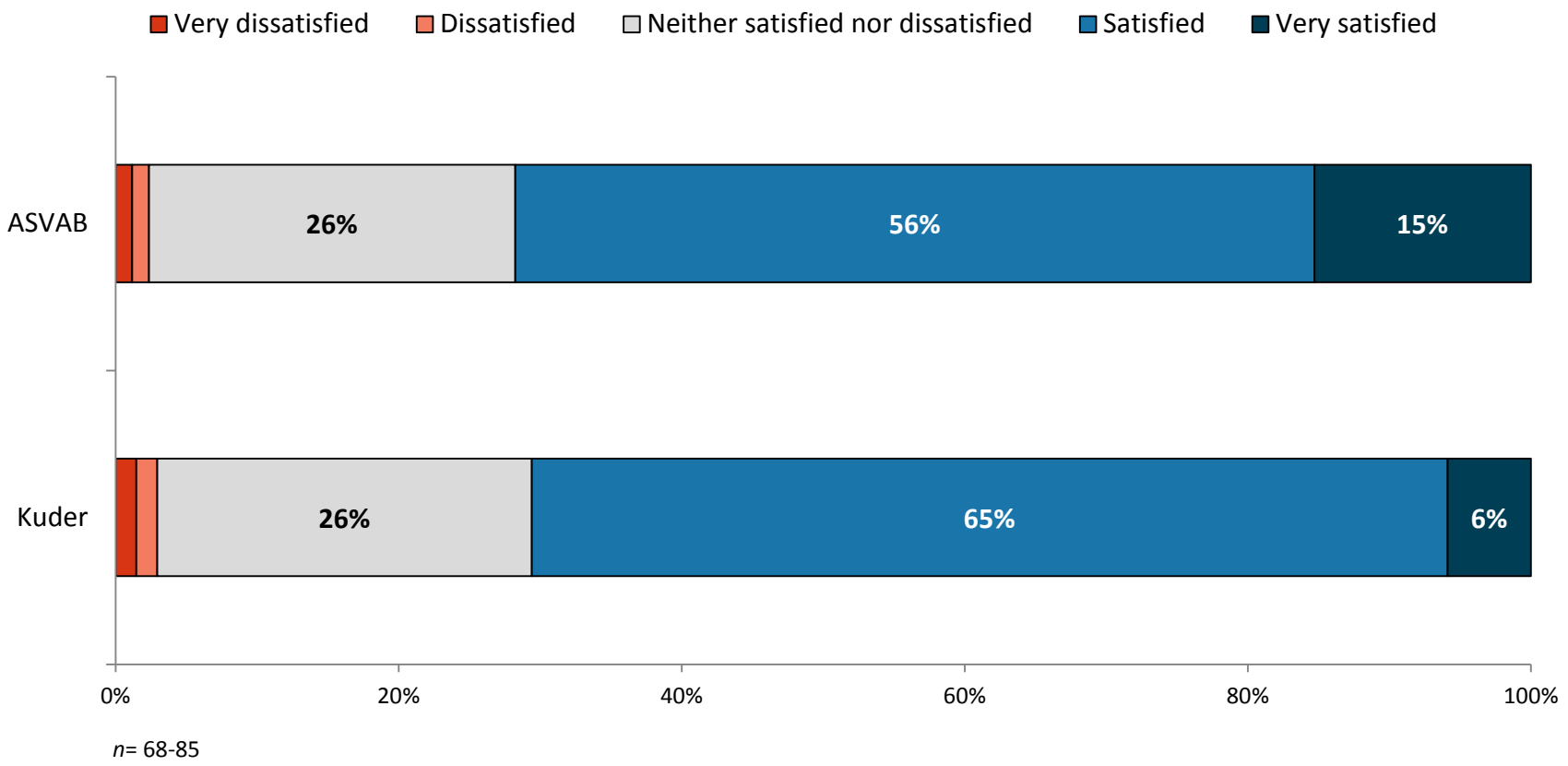
- The few respondents that use Naviance, and Kuder report them as being very important (100% and 73% respectively).



n= 14-30

Satisfaction of School/District with Services, Delivery, and Costs of Programs – Leaders

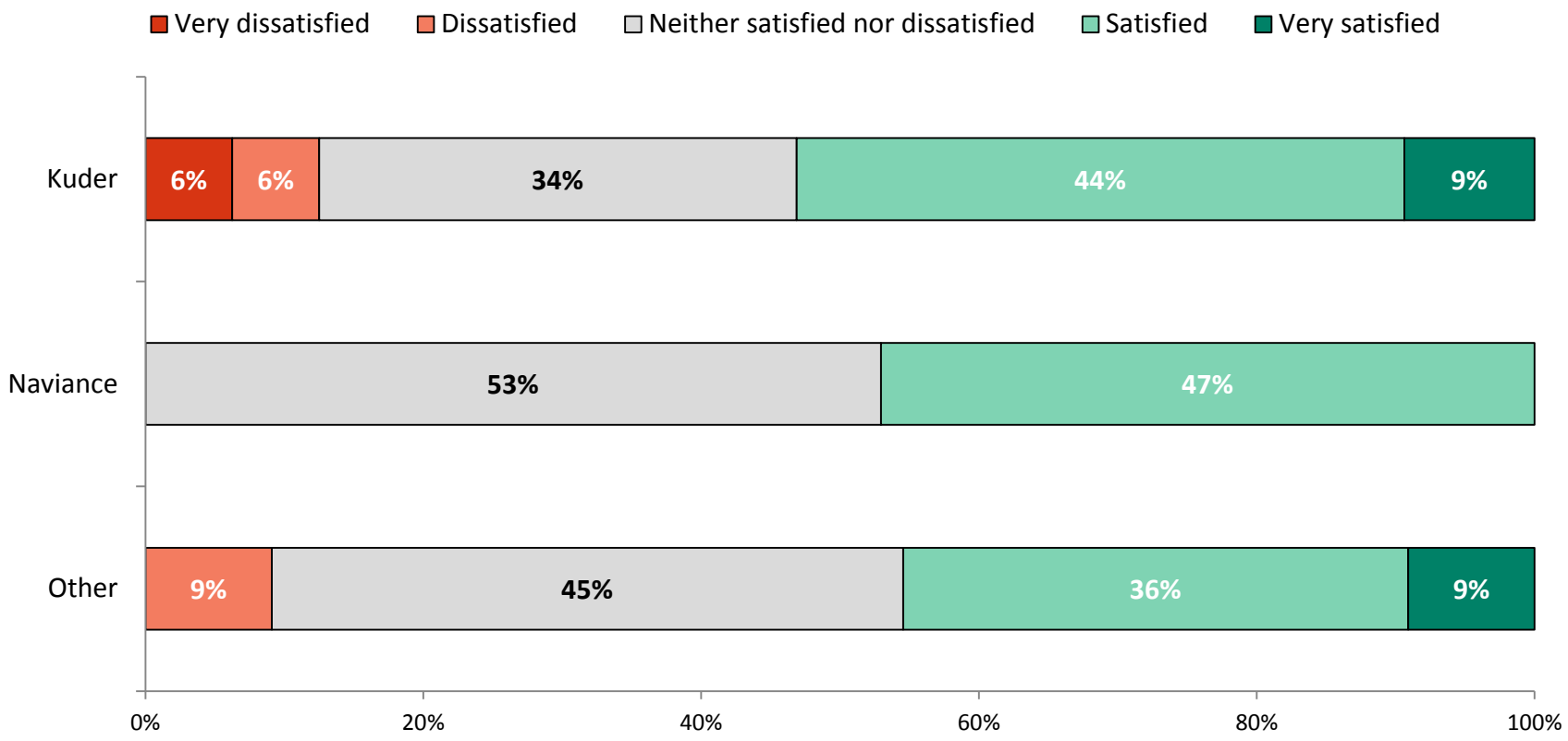
- More than two-thirds of respondents indicate they are satisfied/very satisfied with the two most commonly used academic/career planning products.



n= 68-85

Satisfaction with Services, Delivery, and Costs of Programs – Teachers

- About half of the respondents that use Kuder and Naviance report being satisfied with them (53% and 47% respectively).

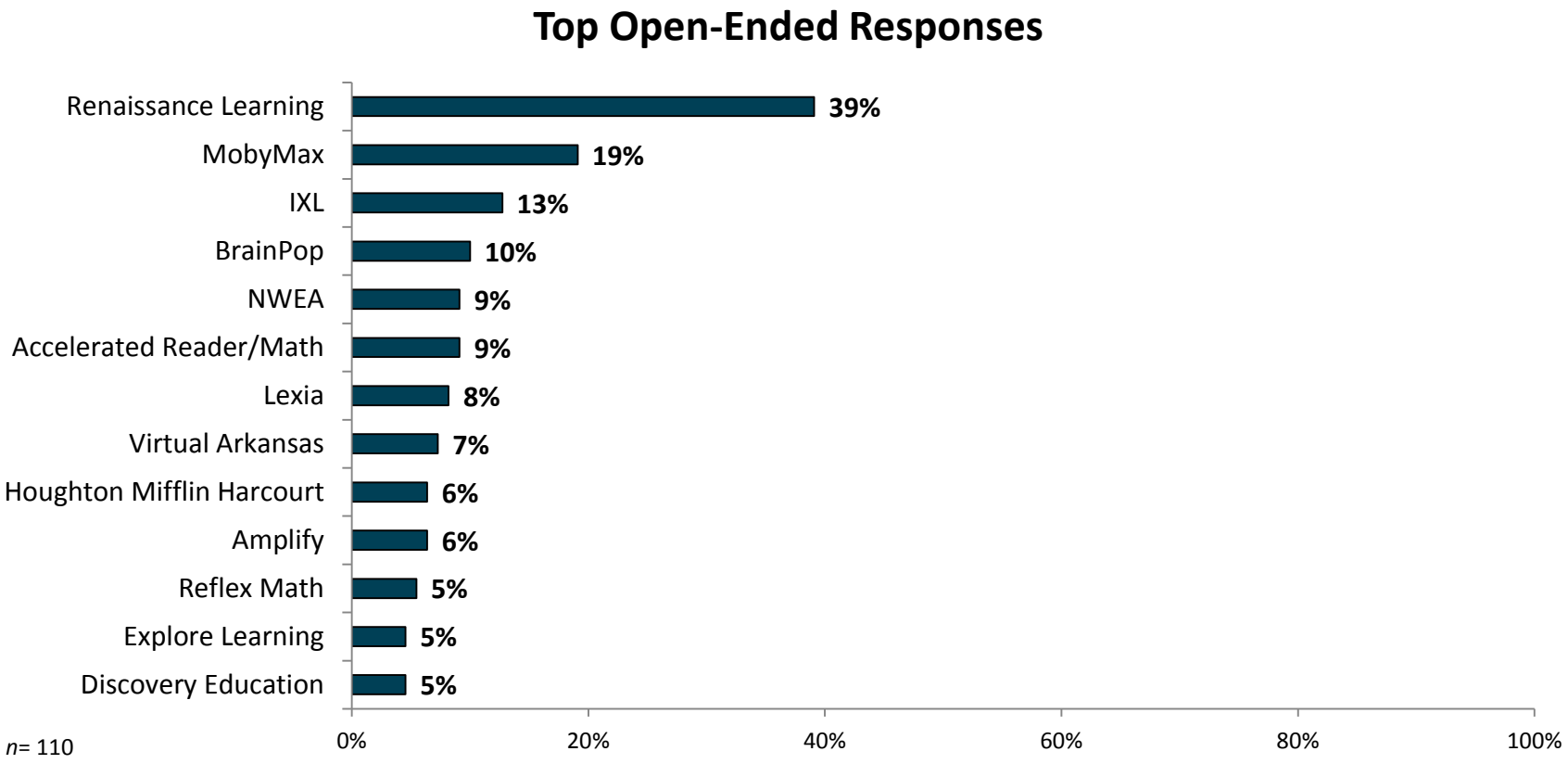


n= 11-32

ADDITIONAL TECHNOLOGY PROGRAMS

Additional Systems Desired – School/District Leaders

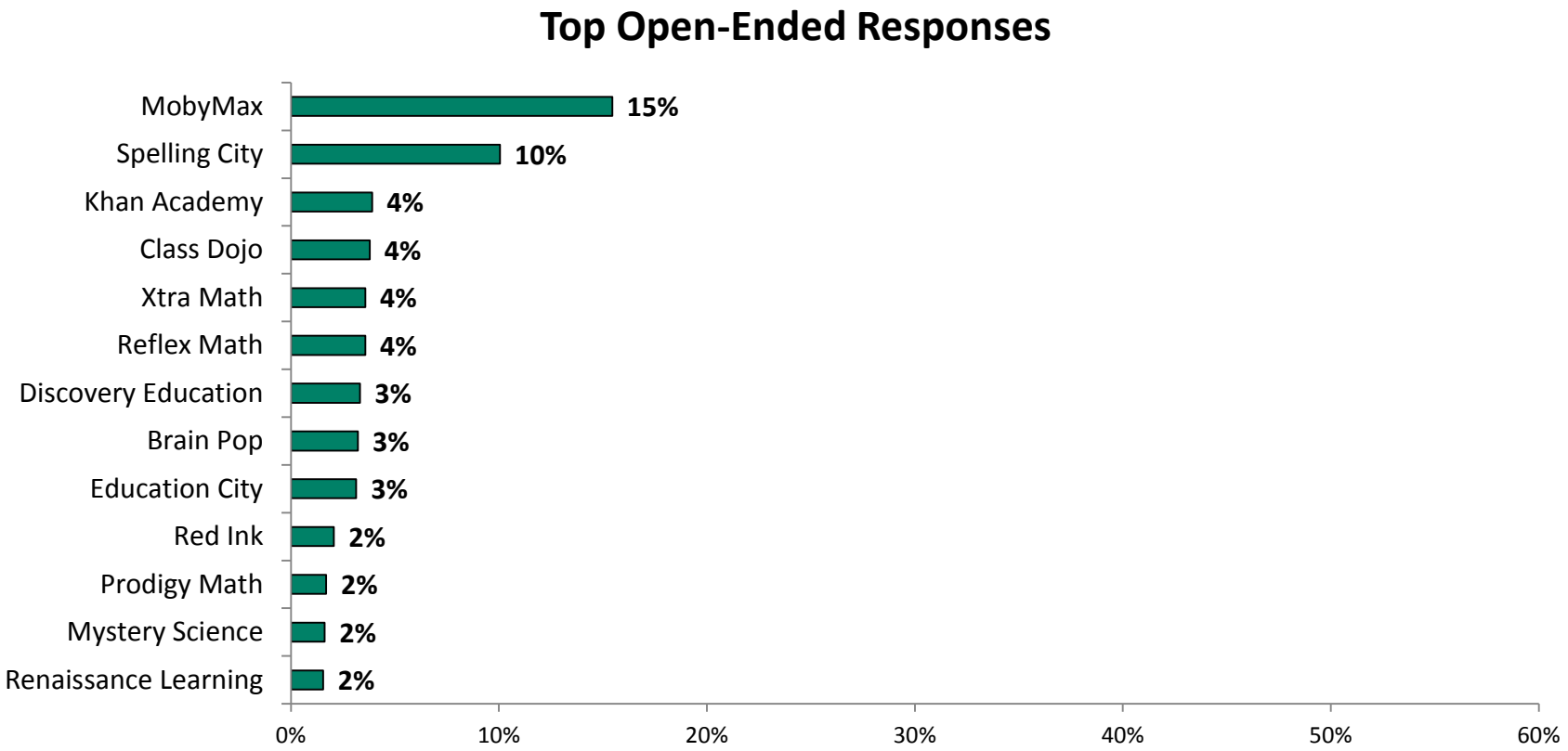
- A substantial number of leaders indicate they would like access to Renaissance Learning (39%), MobyMax (19%), and IXL (13%).



n= 110

Additional Systems Desired – Teachers

- Teachers report that the top technology-related systems they would like to have access to are MobyMax (15%) and Spelling City (10%).



n= 200

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